2015 WinNetStar Training Classes

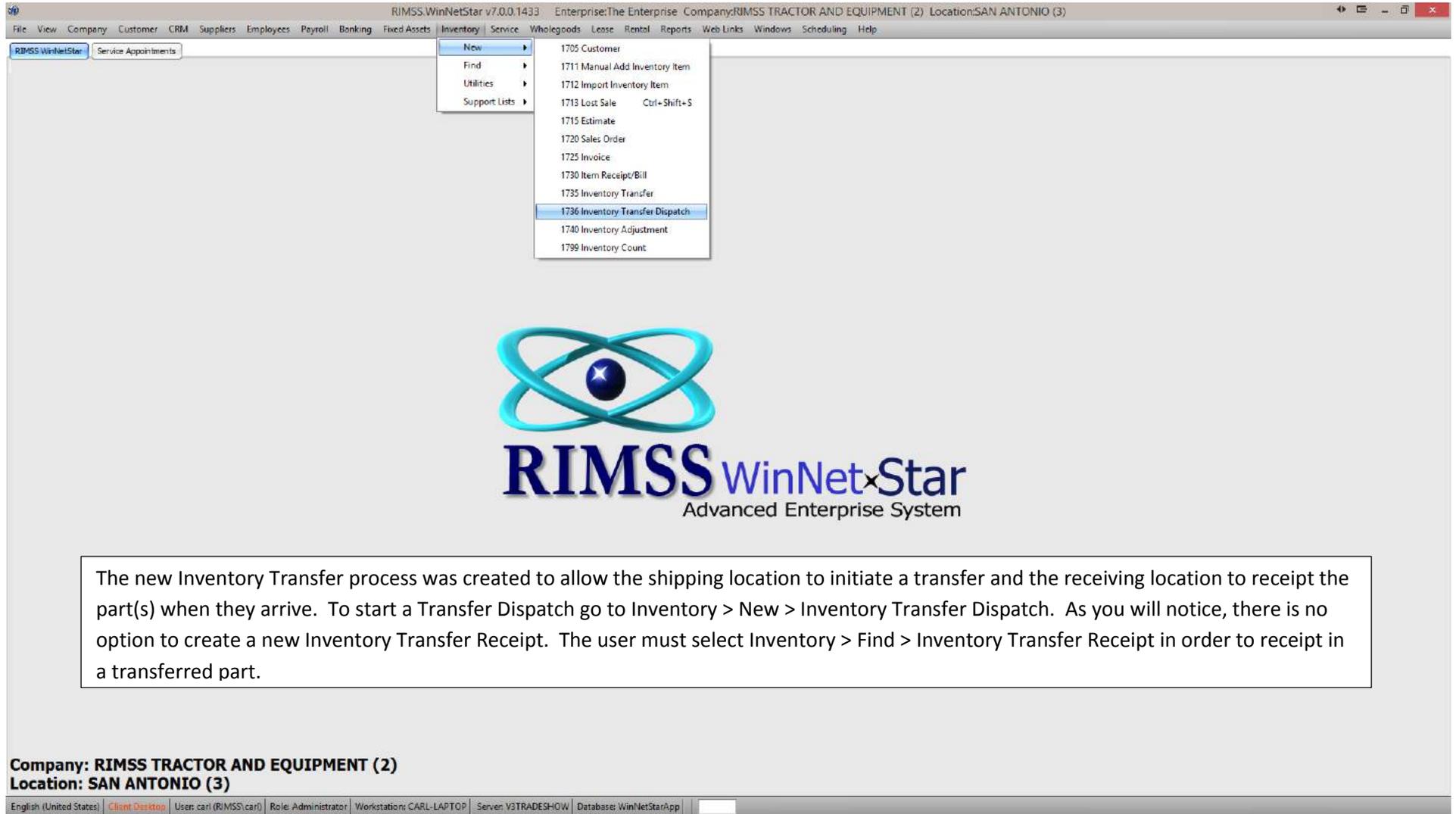# New Inventory Transfer Dispatch & Receipt

Software Development-M9

RIMSS Business Systems Technology

Inventory Transfer Dispatch

The new Inventory Transfer process was created to allow the shipping location to initiate a transfer and the receiving location to receipt the part(s) when they arrive. To start a Transfer Dispatch go to Inventory > New > Inventory Transfer Dispatch. As you will notice, there is no option to create a new Inventory Transfer Receipt. The user must select Inventory > Find > Inventory Transfer Receipt in order to receipt in a transferred part.

Company: RIMSS TRACTOR AND EQUIPMENT (2)
Location: SAN ANTONIO (3)

| RIMSS WinNetStar | Service Appointments | New Inventory Transfer Dispatch ✕ |

Save   Save and Close   Save and New   Print   Void

General   Attachments

Inventory Transfer

Location

From: 001 - SAN ANTONIO ▼   **Shipping Date:** 2/10/2015 ▼   **Dispatch Status:** Open ▼   **Doc. #:** 0

To: 002 - COLLEGE STA... ▼   **Shipping Method:** UPS GROUND ▼   **Expected Delivery Date:** 2/10/2015 ▼

Memo: TRANFER PART TO REMOTE LOCATION

Item Number [   ]   (Item Lookup)

Inventory Transfer Detail

Item Number	Item Description	Quantity	Unit Cost	Amount	Bin Location
70000-20002-620	OIL, 2.5 GAL UDT FLUID (CASE OF 2)	10	$35.62	$356.16	DISP 10
>					

The shipping location will create the Dispatch by selecting the To location and filling out the other header information. The user will then type in their part number and click on Item Lookup and select their part and enter in the quantity being shipped.

Once the item is shipped and ready to go and before the receiving location can create a Receipt of their new inventory, the user must change the Dispatch Status to Shipped. This will allow the receiving location to create a receiving document. Additionally, this decreases the Quantity on Hand of the shipping location.

Inventory Transfer Receipt

Once the receiving location receives the transferred item, they will create a transfer receipt. To create a receipt go to Inventory > Find > Inventory Transfer Receipt.

	Is Voided	Shipping Date	Document Number	From Location	To Location	Memo	Amount	Last Modified By	Last Modified Date	Status	Receipt Status	Shipping Method	Delivery Date
	■												
>	☐	2/10/2015	2	RIMSS TRA...	RIMSS TRA...	TRANFER P...	356.16	carl	2/10/2015	Shipped		UPS GROUND	2/10/2015

✕ ☑ [Is Voided] = 'Indeterminate' Edit Filter

Using the Period drop down or From and To date, select the date range for the originating transfer. In this example, the user will see document created on 2/10/15 with a Status of Shipped. Double-Click to open and initiate the receipt.

Upon opening the document, the user should verify the quantity received, the unit cost and the amount of the items about to be received into their location. Once the user is satisfied with the above, change the Dispatch Status from Shipped to Received. Once saved, this will increase the Quantity on Hand at the receiving location.